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P-CARD USER MANUAL

MAINTAINING DEFAULT OR ASSIGNED PCA, INDEX, OR LOCATION CODES

INTRODUCTION

This document will describe how administrators can make mass changes to their users' default PCA, Index, Location codes (depending on the agency structure) and their users' assigned approval PCA or Index. Administrators in agencies that use Locations will be able to make similar changes to their Locations and Location codes.

By changing a default PCA/Index/Location, all users currently assigned a given default PCA/Index/Location will be updated with a new default PCA/Index/Location – you do not have to edit each individual user. You can also add or delete assigned approval PCA/Index/Location codes for your approvers.

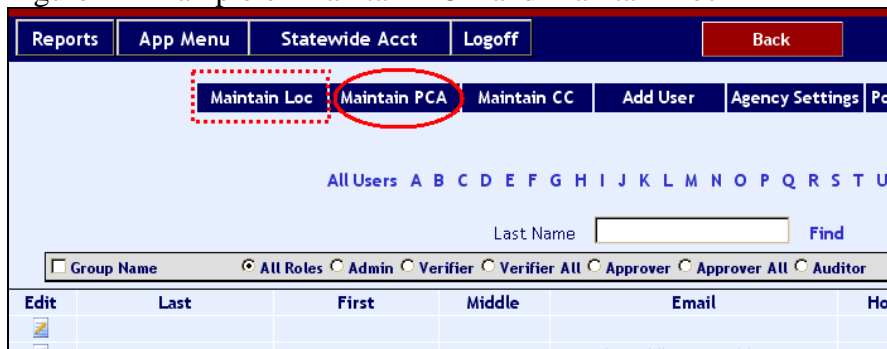
When transactions uploaded to P-Card from MasterCard, they are coded with the PCA/Index that is the default PCA for the card holder(s) at that time. There is no validation done at that point. If a PCA/Index is not changed during the processing of the transaction, it would not be flagged as invalid and could error in STARS.

You can view which users are currently assigned a given default PCA/Index/Location or an Approval PCA/Index/Location to assess which users will be affected.

MAINTAINING PCA, INDEX, OR LOCATION

On the **Administrator** screen, click **Maintain PCA**, **Maintain Index**, and/or **Maintain Loc** (depending on your agency structure).

Figure 1 - Example of Maintain PCA and Maintain Loc



To make a change to the default or the assigned approval PCA, Index, or Location codes, follow the steps below.

CHANGE THE DEFAULT PCA/INDEX/LOCATION

1. Enter the currently assigned PCA or Index in the **Old PCA/Index/Location** field, and then enter the **New PCA/Index/Location**.
2. Click **Change**.

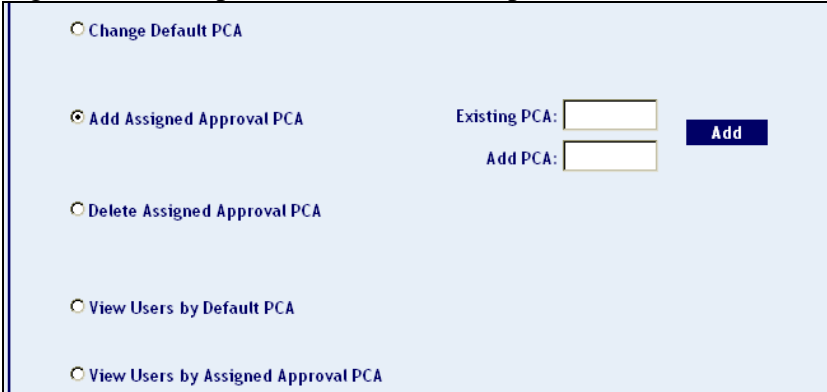
ADD AN ASSIGNED APPROVAL PCA/INDEX/LOCATION

1. Enter the **Existing PCA/Index/Location**.
2. Enter the new PCA/Index/Location to add in the **Add PCA/Index/Location** field.
3. Click **Add**. All approvers assigned to the existing PCA/Index/Location will then also be assigned the additional PCA/Index/Location.

DELETE AN ASSIGNED APPROVAL PCA/INDEX/LOCATION

1. Enter the PCA, Index, or Location to delete.
2. Click **Delete**.

Figure 2 – Example of Maintain PCA options



VIEW USERS

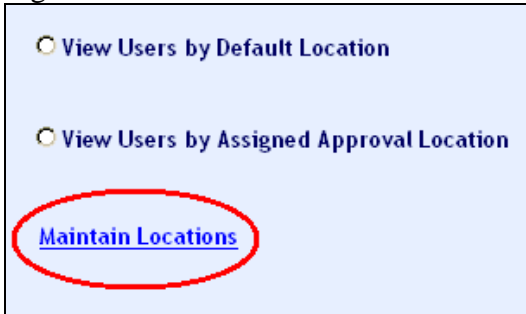
To view the users who are currently assigned a given default or a specific assigned approval PCA, Index, or Location, select one of the following:

1. **View Users by Default PCA/Index/Location** – Enter a PCA, Index, or Location and click **Run**. A list of users currently assigned that PCA/Index/Location will be displayed by last name, first name.
2. **View Users by Assigned Approval PCA/Index/Location** - Enter a PCA, Index, or Location and click **Run**. A list of users currently assigned that PCA/Index/Location will be displayed by last name, first name.

MAINTAIN LOCATIONS

If you selected **Maintain Loc**, there is an additional **Maintain Locations** link that will display your agency's location codes and allow you to edit or delete them or create new ones.

Figure 3 - Maintain Locations link



1. Click the **Maintain Locations** link. You can perform any of the following:
 - Click **Edit** to edit a Location:
 - Change the **Code** and/or **Location Description**, then click **Save**.
 - Click **Delete** to delete a Location.
 - Add a new location at the bottom of the list of Locations:
 - Enter the **Code** and **Location Description** and then click **Save**.

Figure 4 – Add a new Locations example

Code	Location Description		
WH	West Hub Health	Edit	Delete
WHR	West Hub Human Resources	Edit	Delete
WI	West Hub ITSD	Edit	Delete
WM	West Hub Medicaid	Edit	Delete
WMS	West Hub Management Services	Edit	Delete
WS	West Hub Self-Reliance	Edit	Delete
<input type="text"/>	<input type="text"/>	Save	